

North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal Receiving & Processing Vaccine Shipments User Guide

Version 13

March 18, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register:
VAC2021*

3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview

NCDHHS CVMS Provider Portal

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number Go

No Appointment Confirmation Number? Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
Mar 10, 21, 09:47 AM	Wednesday Morning Dose 1 Scheduled	03045809	Clinic Location1
Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

[View all](#)

Receiving and processing COVID-19 vaccine inventory shipments typically involves:

1. Reviewing the Vaccine Inventory Shipment Record
2. Adding Vaccine Inventory
3. Receiving inbound COVID-19 vaccine transfers or redistributions
4. Updating the Vaccine Inventory Record
5. Marking the Vaccine Inventory Record Complete

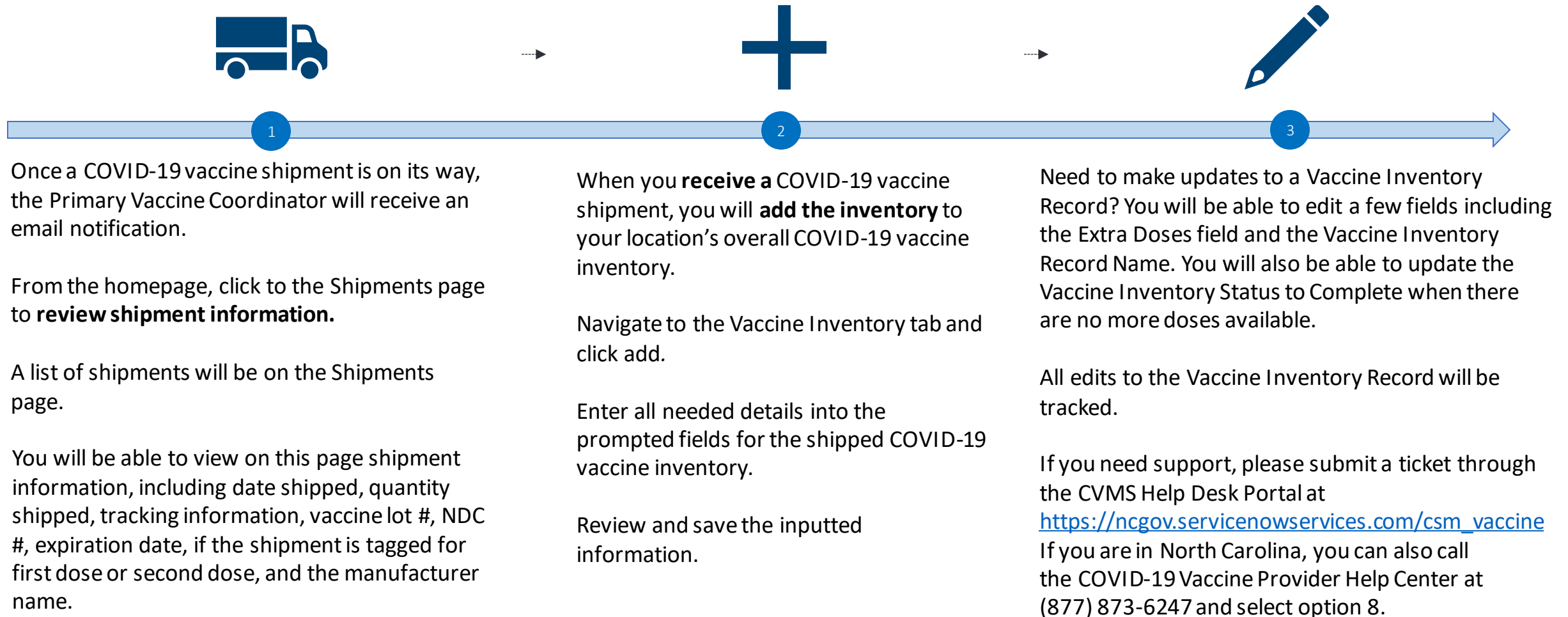
The processes included in this training are for users with a **Healthcare Location Manager** profile only.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov>

Now, let's get started!

Overview of the COVID-19 Vaccine Inventory Receiving Process



Key Terms

Wastage

Vaccine Wastage is the sum of COVID-19 vaccines discarded, lost, damaged, or destroyed.

Insufficient Quantity

COVID-19 Insufficient Quantity events include any time less than what the CDC considers standard doses per vial for the specific COVID-19 vaccine type is able to be administered to recipients.

Vaccine Deprecation

Vaccine Deprecation represents the process in which the amount of COVID-19 vaccines are reduced by the amount of COVID-19 vaccines administered, wasted, lost, or not received.

Vaccine Inventory Shipment details

Vaccine Inventory Shipment Details may include lot number, serial number, and national drug code (NDC).

Extra Doses

Extra Doses are any additional doses that are administered beyond what the CDC considers standard doses per vial for the specific COVID-19 vaccine type.

Redistribution

Redistribution is the planned and scheduled movement of inventory between two enrolled sites within the same organization with an approved redistribution agreement.

Transfer

Transfer is the unplanned and unscheduled movement of inventory between two enrolled sites (move inventory between those who have vaccine to those who do not).

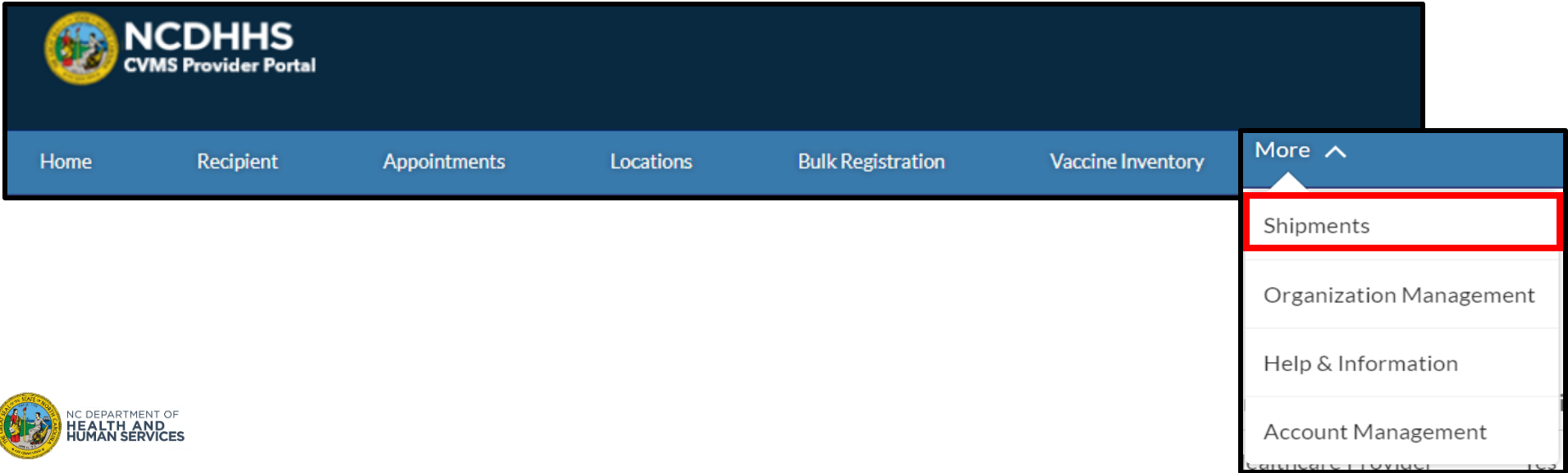
Receiving COVID-19 Vaccine Shipment Notification

Step 1 of 4: Navigate to Shipments

It is important to maintain accurate COVID-19 vaccine inventory levels for the location(s) that you support to remain in alignment with the CDC’s COVID-19 vaccine guidelines. Once a COVID-19 vaccine Inventory shipment is on its way, a **VACCINE SHIPMENT RECORD** will be available for you to review in your **SHIPMENTS TAB**.

The Primary Vaccine Coordinator will also receive an **EMAIL NOTIFICATION** when a **VACCINE INVENTORY SHIPMENT** is on its way to your location.

- 1. At the top of your home page, locate the **MORE TAB**
- 2. Click **SHIPMENTS**
- 3. After clicking **SHIPMENTS**, you will be directed to the **SHIPMENTS PAGE**



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Tips

The Primary Vaccine Coordinator will be notified when a COVID-19 vaccine shipment is on its way. The Primary Vaccine Coordinator was identified by the Organization Administrator during the enrollment process in the CVMS Provider Enrollment Portal.

Step 2 of 4: Switch Shipment Record List Views

You will see a **LIST VIEW** on your page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed list view. To see all your Shipment Records, you will have to switch to the 'All Shipment' records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL SHIPMENTS**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Shipment

Recently Viewed

2 items

LIST VIEWS

All Shipments

✓

Recently Viewed (Pinned list)

1

SHIP-0000000

8 (Quantity) & U6828AA (Lot) & 110011 (Order ID)

Pfizer

59267-1000-01






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Step 3 of 4: Navigate to the Shipment Record

On this page, you will see a list of Vaccine Shipment records for the location(s) you support. The **VACCINE SHIPMENT RECORD** will be **RELATED** to an **ORDER RECORD**. This means that your Vaccine Shipment record will always be associated to a specific order.

- 1. Locate the **SHIPMENT ID**
- 2. Click the **SHIPMENT ID HYPERLINK**
- 3. You will be directed to the **VACCINE SHIPMENT RECORD**

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More ▾									
Shipment All Shipments ▾ 									
14 items • Sorted by Quantity Shipped • Filtered by All shipment • Updated 3 minutes ago									
<input type="text" value="Search this list..."/>    									
	Shipment ID ▾	Quantity... ▾ ▾	Quantity R... ▾	NDC ▾	Manufacturer ▾	Lot Number ▾	Created Date ▾	Shipment Tracking ... ▾	Delivery Number ▾
1	SHIP-0000004	197	200	78978-7878-89	Moderna	U6828AA	12/4/2020, 6:14 PM	30001	101
2	SHIP-0000013	140	150	59267-1000-01	Pfizer	564645	12/5/2020, 12:26 AM	67867886	12345654
3	SHIP-0000002	100	100	59267-1000-01	Pfizer	U6828AB	12/4/2020, 4:28 PM	34354545455	123123123

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Tips

You can use the SEARCH BAR to search for a record. Clicking on column header will sort by the column.

For example, you may choose to sort by SHIPMENT DATE.

Step 4 of 4: Navigate to the Shipment Details

HomeRecipientAppointmentsBulk RegistrationReportsVaccine Inventory

ShipmentSHIP-0000069

DETAILS

RELATED

Information

Shipment IDSHIP-0000069

OrderORD-0000159

Order Product0000000165

Date Shipped (MM/DD/YYYY)01/25/2021

First or Second Dose?

AccountClinic ABC Loc 1

StatusShipped

Primary Coordinator Email

Email Sent to Primary Location Coord☒

VTcks Shipping File

Delivery Number86723754

Delivery Line Number1

Date Shipped20210125

ExIS Order ID_formula7634653

Quantity Requested10

Lot Number34563

Lot Expiration Date01/01/22

Quantity Shipped10

On the Shipment record, you will be able to **REVIEW DETAILS** about your expected order including:

- Date Shipped
- Quantity Shipped
- Tracking Information
- Lot #
- NDC #
- Expiration Date
- Manufacturer
- First Dose or Second Dose tag


1. On the Shipment record, click on the **DETAILS TAB**

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Tips

Review specific details about your order.



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COVID-19 Vaccine Shipment Email Notification

Primary Vaccine Coordinators will be notified via **EMAIL** if a **VACCINE SHIPMENT** has been processed for location(s) they support. You can expect the email to come from the **CVMS Support Team**.

The Primary Vaccine Coordinator will receive an email notification for each shipment **BY VACCINE TYPE**. Details in the email will include:

- Date Shipped
- Quantity Shipped
- Manufacturer
- NDC Number
- Lot Number
- ExIS Order Number
- Carrier
- Shipment Tracking Number

Note: Email will come from nccvms@dhhs.nc.gov

Hello John Smith,

Please see below for details of a COVID-19 vaccine shipment that is on its way to your location.

Vaccine Details:

- **Date Shipped:** 02/01/2021
- **Quantity Shipped:** 300
- **First or Second Doses?:** First Doses
- **Manufacturer:** Moderna TX
- **NDC:** 80777-0273-99
- **Lot Number:** 032L20A
- **ExIS Order ID:** FLU920001FC01302021

Shipment Tracking Information:

- **Carrier:** UPS1
- **Shipment Tracking Number:** 1Z126W010100941170

Need support? Submit your question to the help desk here: https://ncgov.servicenowservices.com/csm_vaccine.

Thank you, NC Department of Health and Human Services

Division of Public Health



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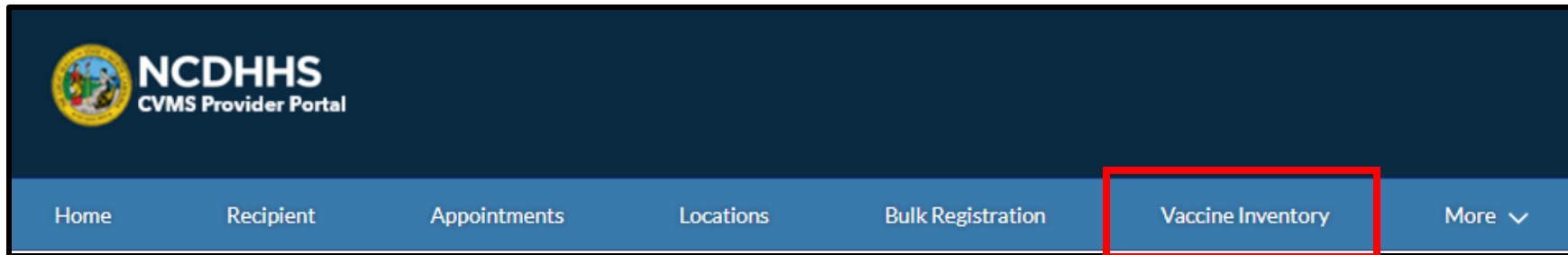
Adding COVID-19 Vaccine Inventory

Step 1 of 7: Navigate to the Vaccine Inventory tab

When you **PHYSICALLY RECEIVE** a COVID-19 vaccine inventory shipment for any COVID-19 vaccine type, you will want to **ADD THE INVENTORY** to your location's overall COVID-19 vaccine inventory. Processing your COVID-19 vaccine shipments correctly will ensure that your COVID-19 vaccine levels are accurate for your reporting.

*This process **DOES NOT** include processing inbound COVID-19 vaccine inventory transfers or redistributions. Please see the Receiving a COVID-19 Vaccine Transfer / Redistribution section for steps on how to process inbound transfers or redistributions.*

1. At the top of your home page, locate the tab **VACCINE INVENTORY**
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY TAB**



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Step 2 of 7: Create a New Vaccine Inventory Record

At the top of the page, you will see the different actions you can take to manage your COVID-19 vaccine inventory. This will be your main working page for ensuring that your inventory levels are accurate. See the **CVMS PROVIDER PORTAL INVENTORY DEPRECATION, TRANSFER, AND REDISTRIBUTION USER GUIDE** at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) to learn more about COVID-19 vaccine Wastage, Insufficient Quantities, and Redistribution / Transfer processes.

- 1. Click **ADD**
- 2. After clicking add, you will be prompted to **PROVIDE ADDITIONAL VACCINE DETAILS**

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Vaccine Inv...

Account N...

Product Name

To...

D...

D...

Expiration Da...

Date and Tim...

Lot

Status

Usage (First o...

Created Date


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Tips

By Default, the view is set as “Recently Viewed”, therefore the list will seem empty at first.

Change the view to “All Vaccine Inventories” and click the THUMBNAIL icon to PIN your favorite list view.



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Step 3 of 7: Enter Vaccine Inventory Information

New Vaccine Inventory: New Vaccine

Fields

* Account ⓘ
Search Accounts... 🔍

* Expiration Date
Date: [] Time: [] ⓘ

* Vaccine Product
Search Vaccine Products... 🔍

* Lot
[]

* Usage (First or Second Doses) ⓘ
--None-- ▾

* Vaccine Inventory Name
Delivery 03/02/2021

Date Received
Date: 3/2/2021 Time: 11:05 AM ⓘ

* Total Doses ⓘ
[]

Extra Doses ⓘ
[]

Federal Allocation? ⓘ
☐

Shipment Details

Shipment
Search Shipment... 🔍

Unable to locate Shipment record ⓘ
☐

Inventory Instructions and Assistance

Cancel Save & New Save

For more information on Extra Doses, see page 'Entering Extra Doses'.

The **NEW VACCINE INVENTORY PAGE** will appear.

To search for a picklist value, you need to enter at least **THREE CHARACTERS**.

1. Populate all required **VACCINE INVENTORY FIELDS**

- Account (Do not create a new Account)
- Vaccine Inventory Name (*editable*)
- Expiration Date
- Date and Time Received
- Vaccine Product
- Total Doses
- Lot #
- Usage (% first dose / second dose)
- Federal Allocation?

2. Continue to **SHIPMENT DETAILS**

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Tips

When adding Inventory into CVMS, we recommend including the Lot #'s in the Inventory Name to help staff that are administering vaccines to recipients to more easily choose the correct Inventory record.

Shipments from DIFFERENT LOT NUMBERS must be entered as separate Inventory records.

Step 4 of 7: Enter Shipment Details

New Vaccine Inventory: New Vaccine

Fields

* Account ⓘ
Search Accounts... 🔍

* Vaccine Inventory Name
Delivery 03/02/2021

* Expiration Date
Date Time
3/2/2021 11:05 AM

* Vaccine Product
Search Vaccine Products... 🔍

* Lot
Total Doses ⓘ
Extra Doses ⓘ

* Usage (First or Second Doses) ⓘ
--None--

Federal Allocation? ⓘ
☐

Shipment Details

Shipment
Search Shipment... 🔍

Unable to locate Shipment record ⓘ
☐

Inventory Instructions and Assistance

Extra Dose Instructions
Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

Inventory Creation Instructions
Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:
https://ncgov.servicenow.com/csm_vaccine

System Information

Cancel Save & New Save

You can now enter the remaining Vaccine Shipment record details.

Do **NOT** reduce the **TOTAL DOSES AMOUNT** if you have wastage or plan to redistribute inventory.

This process **MUST** be recorded separately as **INVENTORY DEPRECIATION**.

1. Select a **SHIPMENT RECORD**
2. If you cannot locate the Shipment record, **CHECK** the **UNABLE TO LOCATE SHIPMENT RECORD** box
3. Before saving, **REVIEW** all entered details
4. Click **SAVE**

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Tips

You may click **SAVE & NEW** to process / add additional Vaccine Inventory records.

Vaccine Pfizer products Ordered on or after January 26 should be logged as the 6 doses/vial Pfizer product (not 5) so that inventory is being tracked per more recent guidance from the CDC. Vaccine Pfizer products Ordered before January 26 should be logged as the 5 doses/vial Pfizer product.

Step 5 of 7: Entering Extra Doses

If you know you will have extra doses, you can update the **EXTRA DOSES** field. You will be able to update this field later to reflect the actual number of extra doses administered.

For an example on when to record **EXTRA DOSES**, please see the **INVENTORY INSTRUCTIONS AND ASSISTANCE** image below.

Note: Entering in Extra Doses is not a required field.

The screenshot shows a web form titled "New Vaccine Inventory: New Vaccine". It contains several input fields for vaccine inventory management. The "Extra Doses" field, located under the "Total Doses" section, is highlighted with a red rectangular border. Other fields include "Account", "Vaccine Inventory Name" (with "Delivery 03/02/2021" entered), "Expiration Date", "Date Received" (with "3/2/2021" and "11:05 AM" entered), "Vaccine Product", "Lot", and "Usage (First or Second Doses)".

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Tips

The Extra Doses field is editable at time of Vaccine Inventory record creation and up until the last dose is administered.

Inventory Instructions and Assistance

Extra Dose Instructions

Use the 'Extra Doses' field when you are able to get more doses than expected out of a vial. This field is editable at time of Vaccine Inventory record creation and up until the last dose is administered. For example, if you receive 195 Vials of Pfizer-BioNTech, enter 975 in Total Doses. If you are able to ultimately administer 1175 doses, the Extra Doses will either equal 200 (1175 minus 975) OR will equal 5 (1175 minus 1170), depending upon if the expectation is 5 (pre 2/16/21 Order) or 6 (post 2/16/21 Order) doses per vial. Your 'Doses Available' will automatically recalculate to include any Extra Doses you have added.

Inventory Creation Instructions

Note: Please double-check Total Doses, Lot, and Expiration Date are correct before saving as these are important for Reporting & Administration. Please search & select an existing record when choosing an Account; do NOT click '+ Create Account'. If you require assistance creating/updating an Inventory record, or have any questions about the CDC COVID-19 Vaccination Program Inventory Management process, please submit your question to the help desk here:

https://ncgov.servicenowservices.com/csm_vaccine

Step 6 of 7: Review the Vaccine Inventory Record

After clicking save, you will be directed to the **VACCINE INVENTORY RECORD**. Your total COVID-19 vaccine inventory has now been updated to reflect this additional inventory.

At the top of the record, your **VACCINE INVENTORY HIGHLIGHT PANEL** will reflect ongoing **DOSAGE ACTIVITY** for this inventory.

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Vaccine Inventory

Delivery 02/12/2021

Request Transfer/Redistribution

Change Status

Edit

Account	Total Doses	Extra Doses	Doses Available	Doses Administered	Doses Wasted
Clinic ABC Loc 1	20		20	0	0

DETAILS

RELATED

▼ Vaccine Inventory Details

Vaccine Product

[Moderna \(10 MDV\) COVID-19 Vaccine](#)

Lot

34

Expiration Date (MM/DD/YYYY)

2/12/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

2

Vaccine Inventory Name

Delivery 02/12/2021

Account

[Clinic ABC Loc 1](#)

Date and Time Received (MM/DD/YYYY)

2/12/2021, 8:18 AM

Status

Available

Federal Allocation?


☐

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Tips

Review the Highlight Panel at the top of the Vaccine Inventory Record.



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Step 7 of 7: Switch Inventory List Views

You will see a **LIST VIEW** on the vaccine inventory page. A list view is a **SUMMARY OF YOUR RECORDS**. By default, you may be directed to the Recently Viewed List View. To see all your Inventory Records, you will have to switch to the All Vaccine Inventory Records list view. You will be able to switch back and forth between list views.

- 1. Click the **DROP-DOWN MENU** next to the list view name
- 2. Click **ALL VACCINE INVENTORIES**
- 3. If you want to make your selection your default list view, click the **THUMBNAIL ICON**

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Tips

Click the THUMBNAIL icon to PIN your favorite list view.

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item • Updated a few seconds ago

Vaccine Inventory ...

Product

1

Delivery 02/12/2021

Moderna

Home

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Scan or type a barcode

Add

Waste

Insufficient Quantity

Inbound Transfer

Outbound Transfer

Vaccine Inventories

Recently Viewed

1 item •

LIST VIEWS

All Vaccine Inventories

Doses Lost In Transit

Inbound Transfers

Outbound Transfers

Recently Viewed (Pinned list)

Search this list...

ose...

Expiration Date (M...

Date and Time Re...

Usage (First or Seco...

Account Name

0

2/12/2021, 12:00 PM

2/12/2021, 8:18 AM

First Dose only (100%)

Clinic ABC Loc 1

Receiving Inventory Tagged as Federal Allocation

A **federally allocated vaccine inventory** means that the vaccine inventory shipment was sent on behalf of the Federal Government.

- **State Allocations:** If the inventory is sent on behalf of the State, your primary Vaccine Coordinator should have been sent an email and a shipment record should be available in the CVMS Provider Portal.
- **Federal Allocations:** If the inventory is sent on behalf of the Federal Government, there will ***NOT be a shipment record in the CVMS Provider Portal***, and you should follow the steps below to mark the inventory as Federal Allocation in the CVMS Provider Portal.

To declare a new Vaccine Inventory record as a **Federal Allocation**, follow the steps below:

1. Click **ADD** from the Vaccine Inventory Tab
2. Populate all required **VACCINE INVENTORY FIELDS**
3. Add the label **FED -** to the beginning of the *Vaccine Inventory name* so that it is easily identifiable.
 - *Note:* This is a required labeling standard for ALL Federal Allocations (e.g., “FED – Delivery”)
4. Check the **FEDERAL ALLOCATION?** Checkbox
5. Click **SAVE**

The screenshot shows the 'New Vaccine Inventory: New Vaccine' form. The 'Fields' section includes: Account (searchable), Vaccine Inventory Name (containing 'Delivery 03/02/2021'), Expiration Date (Date and Time), Vaccine Product (searchable), Total Doses, Lot, Extra Doses, Usage (First or Second Doses) (dropdown menu), and Federal Allocation? (checkbox). The 'Shipment Details' section includes a Shipment (searchable) field and an 'Unable to locate Shipment record?' checkbox. The 'Inventory Instructions and Assistance' section is at the bottom. The 'Save' button is highlighted with a red box.

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Tips

Remember to always add the LOT NUMBER to all vaccine inventory names.

If you are the Healthcare Location Manager for a non-FQHC or non-FEMA site, you will not be able to check the **FEDERAL ALLOCATION?** checkbox. Follow the rest of the procedure as described but omit Step 4.

Federal shipments will not show up in the **VACCINE SHIIPMENTS** tab.

Declaring Vaccine Allocation Availability

Step 1 of 2: Navigate to the Account Record (Location)

You will be able to adjust your availability to receive COVID-19 vaccine inventory each week for your location in the CVMS Provider Portal. It is important that you **UPDATE YOUR AVAILABILITY BY MONDAY AT 10:00 AM EACH WEEK** if you want your adjustment to be considered for vaccine allocation planning.

If you indicate **YES**, that means your location is able to receive COVID-19 vaccine inventory that week if allocated. If you indicate **NO** because you do not have storage or capacity, your location will not be allocated COVID-19 vaccine inventory until you update your preference.

- 1. From the Account Management tab, click the **ACCOUNT NAME (LOCATION)**

HomeRecipientAppointmentsBulk RegistrationVaccine InventoryShipmentsMore

Search by Contact's Name or NCID

Search by Contact's Name

Or

Search by Contact's NCID

SearchReset

Add Member

Name	Email	Title	NCID	Direct Account Name	Account Management	Active
Solutions Hospital				Solutions Hospital		
Solutions Hospital				Solutions Hospital	Healthcare Provider	Yes
Solutions Hospital				Solutions Hospital	Healthcare Location Mgr	Yes
Solutions Hospital				Solutions Hospital	Healthcare Provider	Yes
Solutions Hospital				Solutions Hospital	Healthcare Provider	Yes
Solutions Hospital				Solutions Hospital	Healthcare Location Mgr	Yes
Solutions Hospital				Solutions Hospital	Healthcare Location Mgr	Yes

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Tips

If you have multiple locations, make sure to update each location's Allocation Availability each week as appropriate.

You can also get to the Account Record (Location) from the Vaccine Inventory tab and clicking on the Account Name (Location) field from any row of vaccine inventory records.

Step 2 of 2: Update Your Location’s Availability to Receive COVID-19 Vaccine Inventory

From your Account (Location) Record, you can use the **CHANGE ALLOCATION AVAILABILITY** button to certify that your location is able to receive and administer additional vaccine if allocated. This **VALUE DOES NOT RESET OR AUTOMATICALLY UPDATE EACH WEEK**. It will remain the same as the last updated value until you change it.

Your location’s **ALLOCATION AVAILABILITY STATUS** is defaulted to **YES** upon registration.

- 1. From the Account Record (Location), click the **CHANGE ALLOCATION AVAILABILITY** button
- 2. Select **YES** or **NO** from the drop-down menu
- 3. Click **SAVE**

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Tips

Once you select Yes or No for a location, this selection will remain until you change it.

HomeRecipientAppointmentsBulk RegistrationVaccine InventoryShipmentsMore

Account Solutions Hospital

Change Allocation Availability

Available to Receive Vaccine Allocation

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Change Allocation Availability

* Available to Receive Vaccine Allocation

Yes

Instructions (Available to Receive Vacs)

Please ensure field 'Available to Receive Vaccine Allocation' is correct each week. 'Yes' means the site is able to receive and administer additional vaccine if allocated. A value of 'No' means the site does not wish to receive vaccine or is not able to receive and administer additional vaccine at that time if allocated and the site will not be considered for allocation. This value can be changed at any time, so if you wish to skip one week for any reason (i.e. sufficient supply for next week or storage is at capacity), mark this value as 'No' by Monday 10am for allocation planning that week. If you would like to be considered for allocation, you should have the value set at 'yes' by 10AM on Mondays. The value will STAY in place until a site adjusts it (i.e. if you select 'No,' it will remain 'No' until the site moves it to 'Yes.')

Cancel

Save

Receiving a COVID-19 Vaccine Transfer / Redistribution

Step 1 of 4: Processing an Inbound Transfer

If you are **RECEIVING** an **INBOUND TRANSFER / REDISTRIBUTION** from another location, you will want to review the inbound transfer page to stay up-to-date. When you receive the inbound transfer / redistribution, you will be able to **PROCESS THE INVENTORY** via the **INBOUND TRANSFER PAGE**.

You **DO NOT** process inbound transfers / redistributions from the **ADD INVENTORY PROCESS**.

- 1. From the home page, click **VACCINE INVENTORY**
- 2. Click **INBOUND TRANSFER**

Audience

Healthcare
Location Manager

Tips

Inbound transfers / redistributions are not processed from the Add Inventory Process.

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Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

50+ items • Sorted by Vaccine Inventory Name • Filtered by All vaccine inventories • Updated a few seconds ago

Search this list...

Settings

Grid

Refresh

Print

Filter

Vaccine Inv...

Account N...

Product Name

To...

D...

D...

Expiration Da...


Date and Tim...

Lot

Status

Usage (First o...

Created Date



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Step 2 of 4: Select the Vaccine Inventory Record

On the **INBOUND TRANSFER PAGE**, you will see **VACCINE INVENTORY** records that are incoming transfers / redistributions to your location. You will be able to select the inbound transfer you are ready to process and add it to your inventory.

- 1. Select the correct **VACCINE INVENTORY** record
- 2. Click **NEXT**

Audience

Healthcare
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Previous

Please select the incoming vaccine transfer for which you are confirming receipt.

<input type="checkbox"/> Vaccine Inventory Name	Product ID	Account Name	Status	Incoming Transfer Doses	Serial Number
<input type="checkbox"/> Delivery 12/07/2020	Pfizer-BioNTech (25 MDV) C...	Toe River (Loc 2)	Incoming Transfer in Transit	390	
<input type="checkbox"/> Delivery 12/09/2020	Moderna (10 MDV) COVID-...	Toe River (Loc 2)	Incoming Transfer in Transit	195	
<input type="checkbox"/> Delivery 12/08/2020	Pfizer-BioNTech (195 MDV) ...	Toe River (Loc 2)	Incoming Transfer in Transit	195	

Next

Step 3 of 4: Complete the Inbound Transfer form

Once you select the correct Vaccine Inventory record, you will see the Vaccine Inventory record details pre-populated. You will want to provide the **DOSES RECEIVED** and **DATE RECEIVED**.

After clicking next, your inventory levels will update, and the inbound transfer / redistribution is now processed.

- 1. Enter the **DATE RECEIVED**
- 2. Enter the **DOSES RECEIVED**
- 3. Click **NEXT**

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Previous

Name: Delivery 12/07/2020

Product Name: Pfizer-BioNTech (25 MDV) COVID-19 Vaccine

NDC #:

Lot: U7875AA

Expiration Date: 12/9/2020, 12:00 PM

Serial Number:

Account: Toe River (Loc 2)

Date Received

Dec 9, 2020

Doses Received

390

Incoming Doses Quantity: 390

Previous

Next

Audience

Healthcare
Location Manager

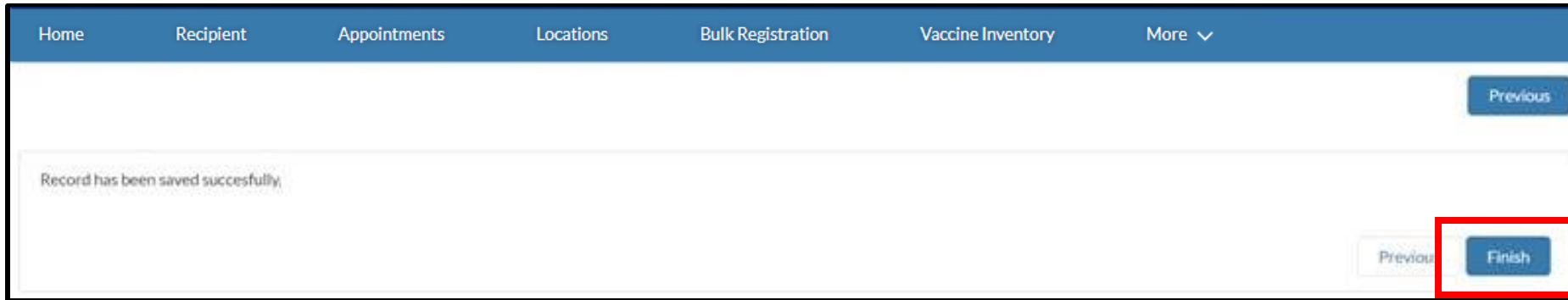
Tips

Identify doses received and date received for the Vaccine Inventory.

Step 4 of 4: Complete the Inbound Transfer

After clicking next, your inbound transfer / redistribution is processed and added to your inventory.

1. Click **FINISH**



The screenshot displays the 'Vaccine Inventory' section of the 'Healthcare Location Manager' application. A blue navigation bar at the top contains links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and a More dropdown menu. Below the navigation bar, a message box states 'Record has been saved successfully'. At the bottom right of the page, there are two buttons: 'Previous' and 'Finish'. The 'Finish' button is highlighted with a red rectangular border, indicating the next step in the process.

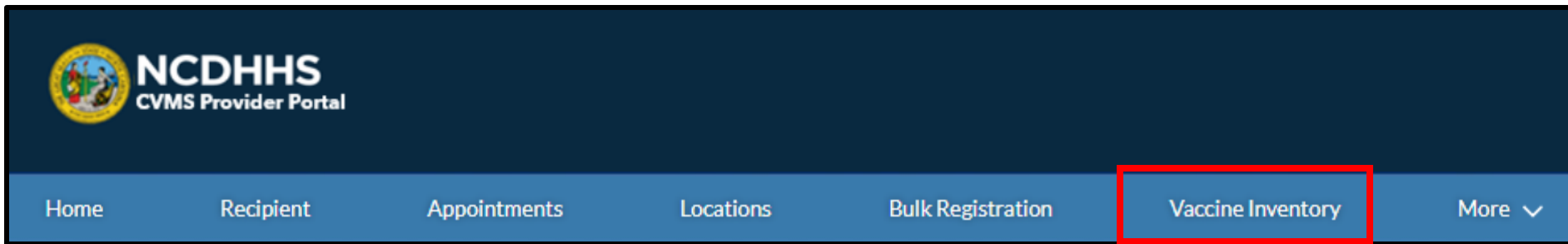
Audience

Healthcare
Location Manager

Updating Vaccine Inventory Record Details

Step 1 of 3: Navigate to the Vaccine Inventory tab

1. At the top of your home page, locate the **VACCINE INVENTORY** tab
2. Click **VACCINE INVENTORY**
3. After clicking **VACCINE INVENTORY**, you will be directed to the **VACCINE INVENTORY** list view



Audience

Healthcare
Location Manager

Step 2 of 3: Navigate to Vaccine Inventory Record

Use the All Vaccine Inventories List View to locate the specific record you need to update. You can **SEARCH** or **SORT** in the list view.

- 1. Identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

Audience

Healthcare
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery 02/09/2021

Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date	
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...

Step 3 of 3: Update the Vaccine Inventory Record

Edit Delivery 02/09/2021

Vaccine Inventory Details

*Vaccine Product

Pfizer-BioNTech (5 doses/vial) (195 MDV) CO... X

*Lot

123

*Expiration Date (MM/DD/YYYY)

Date2/1/2050Time12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

0

*Vaccine Inventory Name

Delivery 02/09/2021

*Account

Clinic ABC Loc 1 X

Date and Time Received (MM/DD/YYYY)

Date2/9/2021Time12:20 PM

Status

Incoming Transfer in Transit

Federal Allocation?

☐

Dose Amounts

Total Doses

0

Doses Administered

0

Cancel

Save & New

Save

Before you edit, make sure you are on the appropriate record.

Remember, you must always save your changes.

1. Click the **EDIT BUTTON** on the right-hand side
2. Locate the field you want to make changes to
3. Update the field
4. Click **SAVE**
5. If the field does not update, click **REFRESH** and try again

Audience

Healthcare Location Manager

Tips

Vaccine Inventory Status can be edited by Completing the Vaccine Inventory (Review next section).

If additional doses of the Vaccine Inventory are identified, use the Extra Doses field to edit that Inventory directly.

Reviewing Vaccine Inventory History

Vaccine Inventory
Delivery 01/20/2021

Account

Clinic ABC Loc 1

Total Doses

300

Extra Doses

0

Doses Available

280

Doses Administered

20

Do

0

DETAILS

RELATED

Appointments (6+)

New

Appointment	Contact Name	Status	Vaccine Status
00112244	Lonzo Ball	Closed	Dose 1 Administered
00112228	Peter Parker	Closed	Dose 1 Administered
00112225	Anthony Stark	Closed	Dose 1 Administered
00112223	Mariah Carey	Closed	Dose 1 Administered
00112220	Judd Apatow	Closed	Dose 2 Administered
00112217	Mario Lopez	Closed	Dose 2 Administered

View All

Wastage Events (0)

New

Orders (0)

New

Vaccine Inventory History (6+)

Date	Field	User	Original Value	New Value
1/26/2021, 6:50 PM	Date and Time Receiv...	Azalea Troche	1/15/2021, 6:10 PM	1/15/2021, 2:30 AM
1/26/2021, 5:39 PM	Extra Doses	Azalea Troche		0
1/26/2021, 5:00 PM	Doses Administered	sergio.lizano.paniagua	19	20
1/26/2021, 1:11 PM	Doses Administered	sergio.lizano.paniagua	18	19
1/26/2021, 1:00 PM	Doses Administered	sergio.lizano.paniagua	17	18
1/26/2021, 12:30 PM	Doses Administered	sergio.lizano.paniagua	16	17

View All

All changes and edits made to the Vaccine Inventory Record are captured within the CVMS Provider Portal in the Vaccine Inventory History.

1. From the Vaccine Inventory Record, click on the **RELATED** tab.
2. Scroll down to **VACCINE INVENTORY HISTORY**
3. Review all Vaccine Inventory History

Click View All to look at all the Vaccine Inventory History changes made to the record.

Audience

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Location Manager

Adding Comments/Notes to a Vaccine Inventory Record

▼ Dose Amounts	
Total Doses ⁽¹⁾ 100	Doses Administered ⁽¹⁾ 2
Extra Doses ⁽¹⁾	Doses Wasted ⁽¹⁾ 0
Doses Available ⁽¹⁾ 98	Doses Insufficient Quantity ⁽¹⁾ 0
Incoming Transfer Doses ⁽¹⁾	Doses Transferred ⁽¹⁾
Doses Lost in Transit ⁽¹⁾ 0	Doses Received ⁽¹⁾
Inbound Transfer? <input type="checkbox"/>	Outbound Transfer? <input type="checkbox"/>
▼ Comments/Notes (Optional)	
Comments/Notes ⁽¹⁾	

Any comments/notes related to the Vaccine Inventory record can be captured in the **COMMENTS/NOTES** field.

1. From the Vaccine Inventory Record, scroll down to the **COMMENTS/NOTES (OPTIONAL) SECTION**
2. Click the pencil icon to edit
3. Add any comments/notes in the free text field and click **SAVE**

[illegible]

Audience

Healthcare Location Manager

Marking a Vaccine Inventory as Complete or Reserved for Future Use

Step 1 of 3: Navigate to Vaccine Inventory Record

When a Vaccine Inventory record has zero available dose left, and no extra dose can be extracted from the vials, you will be able to update the Vaccine Inventory record status as Complete. This will help the NCDHHS allocation team to identify which Vaccine Inventory records do not have any remaining doses to be administered.

- 1. From the **VACCINE INVENTORY TAB**, identify the **VACCINE INVENTORY RECORD** that you wish to update
- 2. Click the **VACCINE INVENTORY NAME HYPERLINK**

Audience

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Scan or type a barcode

AddWasteInsufficient QuantityInbound TransferOutbound Transfer

Vaccine Inventories

All Vaccine Inventories

7 items • Sorted by Expiration Date (MM/DD/YYYY) • Filtered by All vaccine inventories • Updated a few seconds ago

Delivery 02/09/2021

Vaccine Inven...	Account N...	Product Name	To...	D...	D...	Expiration ...	Date and Tim...	Lot	Status	Usage (First or...	Created Date	
1	Delivery 02/09/2...	Clinic ABC Loc 1	Pfizer-BioNTech ...	0	0	0	2/1/2050, 12:00 ...	2/9/2021, 12:20 ...	123	Incoming Transfer...	First Dose only (1...	2/9/2021, 12:31 ...

Step 2 of 3: Click the Change Status Button

- 1. At the top of the Vaccine Inventory page, locate the **CHANGE STATUS** button
- 2. Click the **CHANGE STATUS** button

Audience

Healthcare
Location Manager

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Vaccine Inventory

Delivery 02/16/2021

Request Transfer/RedistributionChange StatusEdit

Account	Total Doses	Doses Available	Doses Administered	Doses Wasted	Doses Insufficient Quantity
RPA Location 1	5,000	4,997	3	0	0

DETAILS

RELATED

▼ Vaccine Inventory Details

Vaccine Product

[Pfizer-BioNTech \(5 doses/vial\) \(195 MDV\) COVID-19 Vaccine](#)

Lot

1234567

Expiration Date

4/30/2021, 12:00 PM

Usage (First or Second Doses)

First Dose only (100%)

Total Vials

1,000

Vaccine Inventory Name

Delivery 02/16/2021

Account

[RPA Location 1](#)

Date Received

2/16/2021, 4:21 PM

Status

Available

Federal Allocation

☐

Step 3 of 3: Select the Complete Status & Save

You will be prompted to update the **STATUS**. Once you save your changes, the Vaccine Inventory status will update accordingly. Definitions for each status are provided on this screen to ensure you select the appropriate **STATUS**.

1. Select the appropriate **STATUS**
 - Complete
 - Reserved for Future Use
 - Available
 - Transferred
 - Wasted
 - Incoming Transfer in Transit
2. Click **SAVE**

Change Status

* Status
Complete

Complete (Definition) Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.	Reserved for Future Use (Definition) Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.
Available (Definition) Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.	Wasted (Definition) Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.
Transferred (Definition) Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.	Transfer in Transit (Definition) Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

Cancel Save

Audience

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Location Manager

Tips

Use this feature to update the Vaccine Inventory status to Complete when you have zero doses available.

Failed Complete Status Update

The alert screen below will be displayed if your doses available does not equal 0. You will be unable to update the Vaccine Inventory Status to Complete until the appropriate adjustments are made to your Vaccine Inventory. Once resolved, you can go back and Complete the Vaccine Inventory Status.

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Change Status

Review the errors on this page.

* Status

Complete

Doses Available must equal 0 (zero) to mark this Status=Complete. Please adjust Extra Doses, Doses Administered, and/or Doses Wasted as needed in order for "Doses Available" calculation to indicate a value of 0.

Complete (Definition)

Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.

Reserved for Future Use (Definition)

Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow.

Cancel

Save

Reserved for Future Use Status

Putting a Vaccine Inventory Record in the **RESERVED FOR FUTURE USE** status will remove it from being displayed on the vaccination administration screen for Healthcare Providers to select when vaccinating recipients.

The screenshot shows a 'Change Status' dialog box with a dropdown menu set to 'Complete'. Below the dropdown, there are six status options arranged in two columns:

- Complete (Definition)**: Use when there are truly zero doses of this inventory remaining. Inventory with this status will NOT be shown in the Vaccine Administration flow. Only records with 'Doses Available = 0' can have this status.
- Reserved for Future Use (Definition)**: Use when there is a least one dose of this inventory remaining and you do NOT want this inventory to be shown in the Vaccine Administration flow. (This option is highlighted with a red box.)
- Available (Definition)**: Use when there is a least one dose of this inventory remaining. Only inventory with this status and 'Doses Available > 0' will be shown in the Vaccine Administration flow.
- Wasted (Definition)**: Indicates all doses & vials within this inventory were wasted. Only records with 'Doses Available = 0' can have this status.
- Transferred (Definition)**: Indicates all doses & vials within this inventory were transferred/redistributed to another Location. Only records with 'Doses Available = 0' can have this status.
- Transfer in Transit (Definition)**: Please do NOT manually set this status. Indicates this inventory is an inbound transfer/redistribution that has not yet arrived. The 'Inbound Transfer' button & flow is used to accept the inventory and automatically updates the status to 'Available'.

At the bottom right of the dialog box, there are two buttons: 'Cancel' and 'Save'. The 'Save' button is highlighted with a red box.

Audience

Healthcare
Location Manager





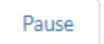
Tips

This status may be helpful to flag Inventory Records at a location that should not be selected by Healthcare Providers when vaccinating recipients (e.g., reserved for second dose, reserved for upcoming mass vaccination clinic, flagged for transfer or redistribution).

Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

User Guide Change Log

Key Items:

- **Date of Change:** Date that any updates were made to the User Guide
- **Changes Made:** Summary of the updates made within the User Guide
- **Impacted Slides:** Specific slides that were updated or changed
- **Author:** The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	• Original version		Azalea Troche
2	12/21/2020	• Updated shipment email notification • New slides on List Views and Account (Location) Record	• 12 • 10, 20, 21, 22	Nicholas Rinz
3	12/31/2020	• Tips on adding inventories	• 10, 16, 17	Simon Couderc
4	1/10/2021	• Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information.	• 1, 2, 6, 13, 29, 30	Courtney Seward
5	1/14/2021	• Updated navigation bar	NA	Azalea Troche
6	1/22/2021	• Removed Account Inventory Slides • Add reports tab on navigation bar • Extra Doses • Complete Vaccine Inventory	• NA	Nicholas M. Rinz
7	1/28/2021	• Updated screen shots to show new nav bar	• 5,9,10,11,12,15,16, 20,21,23,24,25,26, 28,30,31	Kristin Clark
8	2/8/2021	• Updated Declare Vaccine Allocation Availability Section	• 22,23	Nicholas M. Rinz
9	2/14/2021	• Updated screenshots and verbiage to Insufficient Quantities • Updated Vaccine Allocation Availability section	• 7,16,17,18,19,20,21,25, 31,32,35,36,37, 23, 24	Kristin Clark
10	3/2/2021	• Updated screenshots and added federal allocation slide	• 22	Nicholas M. Rinz
11	3/10/2021	• Updated screenshots and added vaccine inventory comments	• All, 36	Nicholas M. Rinz

User Guide Change Log

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Version	Date of Change	Changes Made	Impacted Slides	Author
12	03/15/2021	<ul style="list-style-type: none">• Federal Allocation for non-FQHC or FEMA sites	<ul style="list-style-type: none">• 22	Darrell Lee
13	3/18/2021	<ul style="list-style-type: none">• Update Change Allocation Status tips and default status	<ul style="list-style-type: none">• 24,25	Nicholas M. Rinz